



COSA PRIME*Link* Internal User Guide

Capital Improvements Management Services

August 2012

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Submit a Contract Change Request

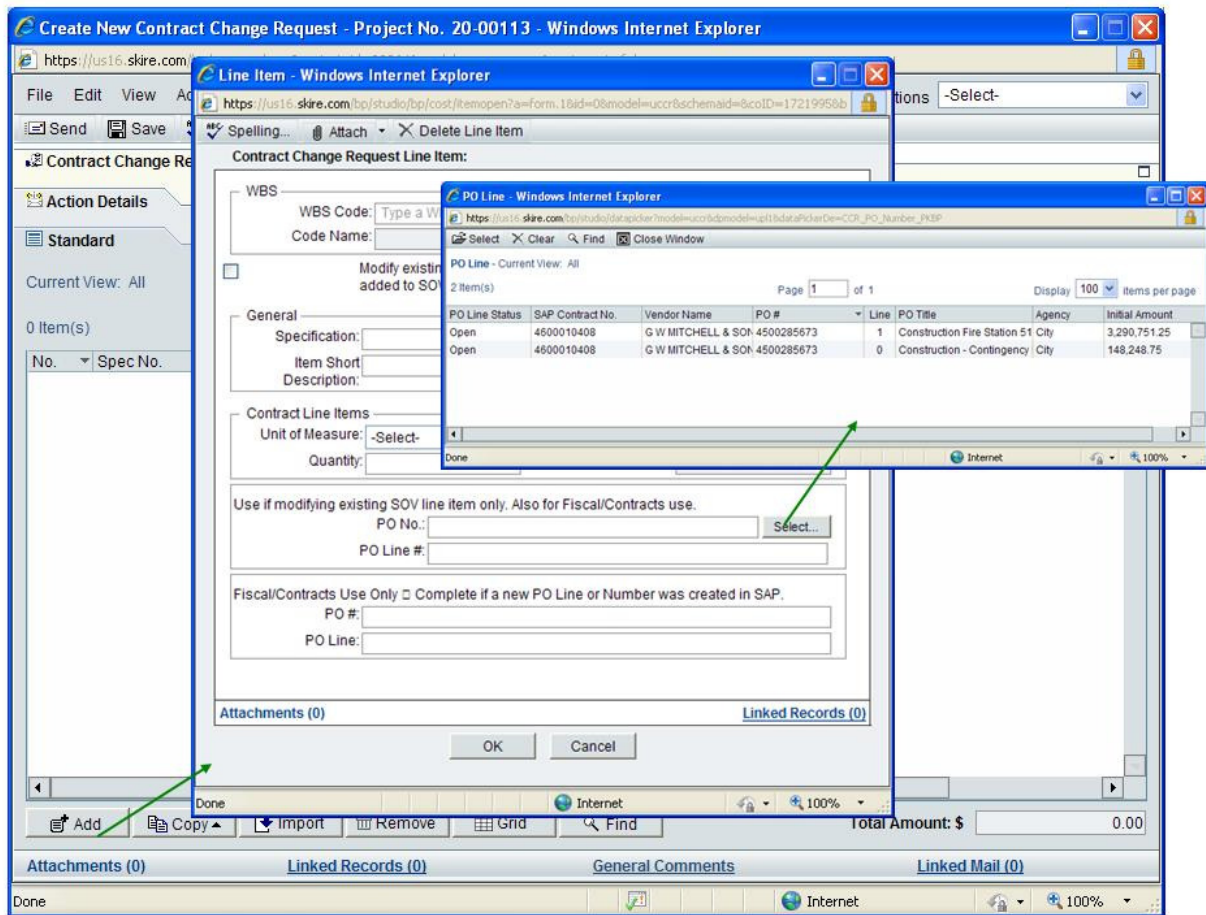
NOTE: Contract Changes replace amendments, change orders and task orders within the projects

1. Go to your project
2. Select Collaboration
3. Select Task
4. Select New → Contract Change Request
5. Complete fields as desired
 - White background text boxes - editable fields
 - Fields with a red * - required fields
 - Blue-gray text box - read-only
 - Pickers - select from a list of options or a dialog box will appear with a selection
 - Click on Select
 - Click on Find

The screenshot shows the 'Create New Contract Change Request' web form in Internet Explorer. The form is divided into two main sections: 'General' and 'Contract'. The 'General' section includes fields for Project Number, Record Number, Title, Project Name, Status, and Contract #. The 'Contract' section includes a 'Find' form with fields for SAP Contract No., Vendor Name, Project Name, and Project ID. Below the 'Find' form is a table listing various contract items with columns for Item ID, Description, Project Name, and Amount. The table contains 19 items, including construction and engineering services. The bottom of the form shows 'Workflow Actions' and 'Standard' tabs.

Item ID	Description	Project Name	Amount
4500011273	Construction	E-Z BEL CONSTI 0001014214	Project Contract: 4,599,979.28
4500010408	Construction	G.W MITCHELL 0001016255	Project Contract: 3,445,418.00
4500010360	Construction	SAN ANTONIO C 0001004406	Project Contract: 3,460,910.13
4500009095	Engineering	HDR ENGINEER 0001019380	Project Consulta: 1,182,990.00
4500008160	Architectural	CHESNEY MORV 0001013640	Project Consulta: 441,022.50
4500007484	Engineering	PATE ENGINEER 0001034507	Project Consulta: 570,665.77
4500007342	Engineering	FERNANDEZ FR 0001014395	Project Consulta: 519,548.51
45000000	Construction	CCC Constructio 987654321	Project Consulta: 1,000,000.00
123456789	Engineering	WINGS 0001021362	Project Consulta: 250,000.00
1	Engineering	WINGS 0001021362	Project Consulta: 0.00
0000008175	Construction	CCC Constructio 987654321	Project Consulta: 555,000.00

6. Select an action from the Workflow Action list on the upper right hand corner
7. Select the Lower Form (Standard)
8. Click on Add



9. Fill in the necessary fields
10. Click Ok
11. Then press Send
 - You will see a dialog box stating the contract change request has been submitted successfully

Submit a Task Order

1. Go to your on-call contract
2. Select Collaboration
3. Select Task
4. Select New → Task Order
5. Complete fields as desired:
 - a. Title
 - b. Task Description
 - c. Number of Calendar Days
 - d. Requestor's Department
 - e. Agency
 - f. Funding Source
 - g. Comments

Note:

White background text boxes - editable fields

Fields with a red * - required fields

Blue-gray text box - read-only

Pickers - select from a list of options or a dialog box will appear with a selection

Create New Task Order - Project No. 4600012039 - Microsoft Internet Explorer provided by City of ...

https://us20.skire.com/bp/process/new?module_name=uto&project_id=30901

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Add Attachment Discussion Close Window

Task Order Development... Task Order

Vendor Name: PSE CONTRACTING LLP

Date Prepared: 08/20/2012

Task Request: [Select...]

Project: [Select...]

Project Number: [Text]

Project Name: [Text]

Contract: [Text]

Status: [Text]

Type Contract: Construction

Task Request Ref (if auto-created): [Text]

Task

Title: A

Task Description: B

Number of Calendar Days: C *

Task Amount: 0.00

Requestor Information

Creator: Fernando Hernandez

Requestor's Department: -Select- D *

Agency: -Select- E *

Requestor's Phone No.: [Text]

Requestor's Division: [Text]

Job Order Number: [Text]

Funding Information

Funding Source: F *

Comments: G

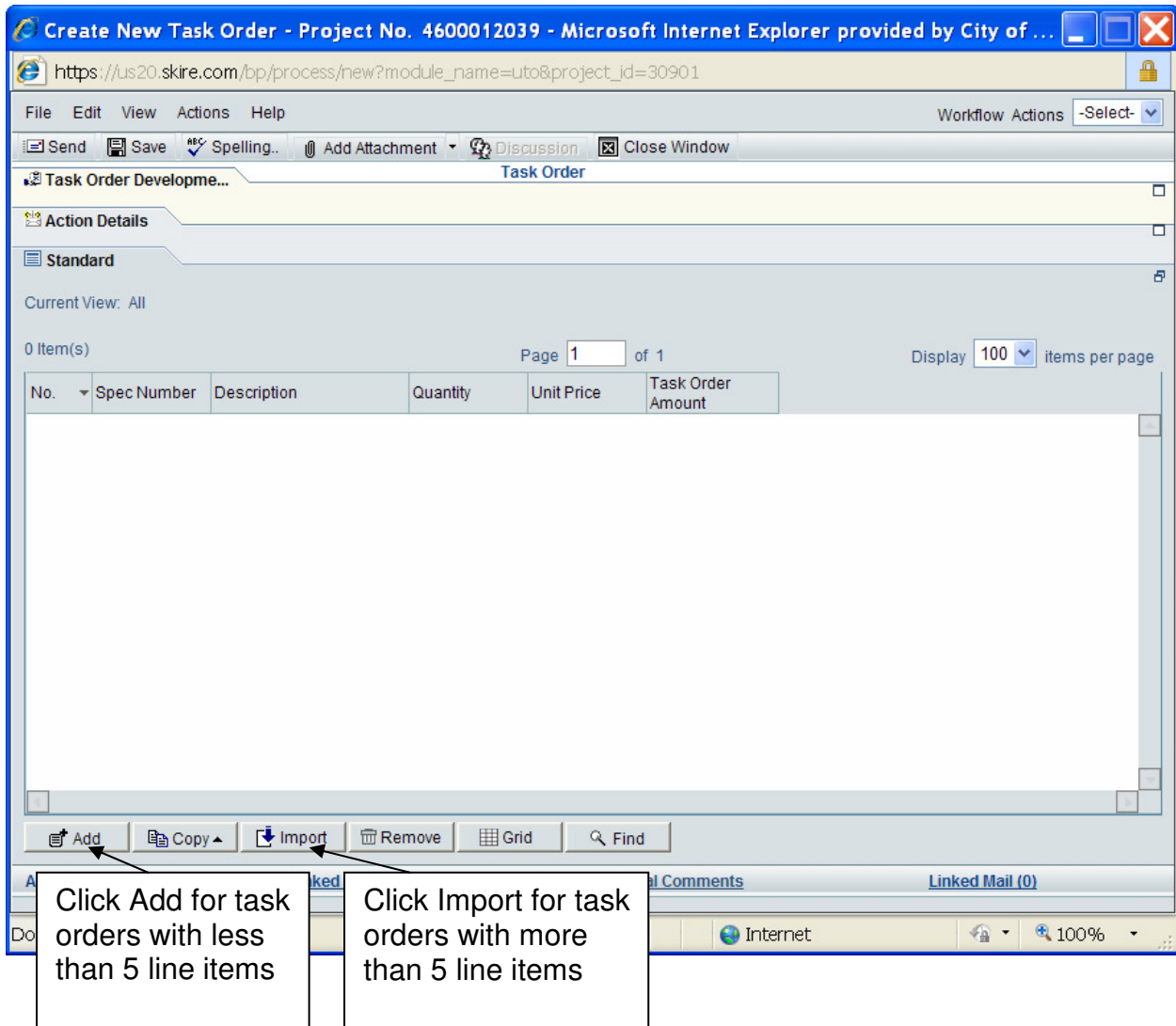
Action Details

Standard

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Done Internet 100%

6. In the Standard tab, click Add or Import to enter line items. To import line items, refer to *Procedures for Importing Task Order Line Items* how-to guide
7. Click Add Attachment → My Computer to add an attachment
8. Select an action from the Workflow Action list on the upper right hand corner
9. Click Send

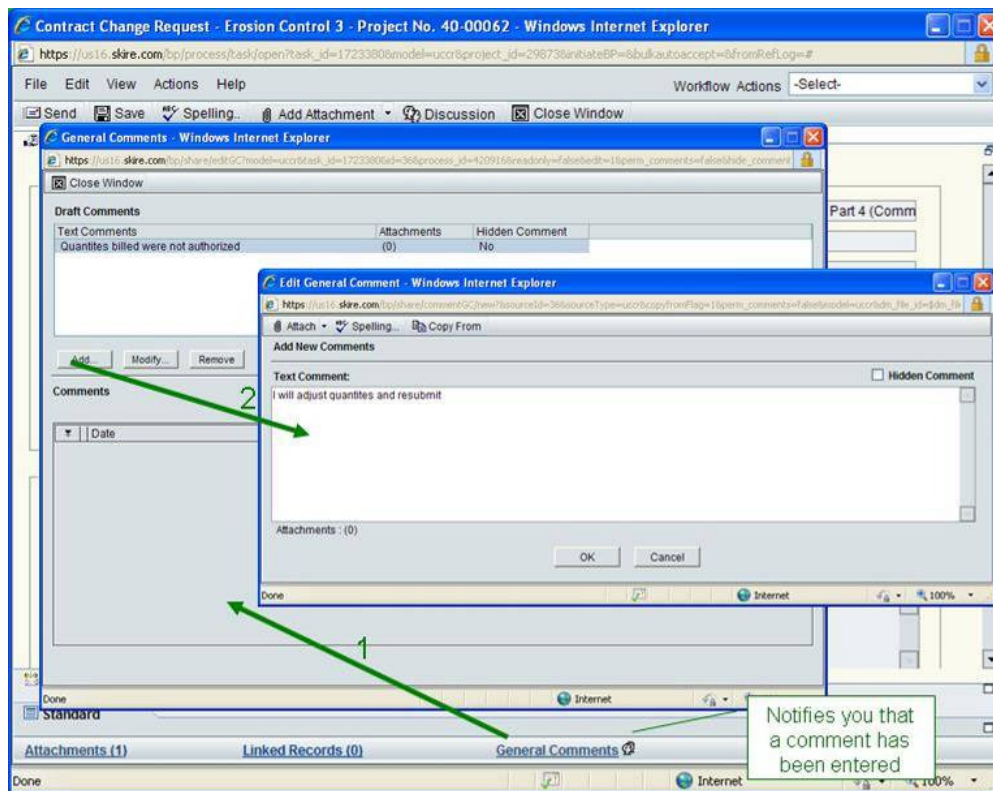


Approve a Task

1. Go to your project Dashboard
2. Under Items Requiring Your Attention – Select Tasks
3. Double Click on a task on your list and review the item
4. Click on Accept Task or Decline Task - on the Upper Right hand corner
 - If accepted – Review the file
 - Select an action - Under Workflow Actions
 - Click on Send
 - If declined – you will receive a dialog box stating: your name will be removed from this step for this record. Are you sure you want to decline task?

Reject a Task

1. Open Task
2. Accept Task
3. On the bottom of the screen Click on General Comments
4. Click on Add
5. Type in Reason
6. Click ok
7. Click Close Window
8. Select and Action
9. Click on Send



Check Contract Change Request

1. Go To Collaboration
2. Select Tasks
3. On the right side – Select the Change Request you are inquiring
4. Select the from Fiscal Review
5. Select the link next to Task Status
6. You will see the workflow process
 - If you click on view Graphic you will see the workflow

Note: If you click on the menu bar / view - you can see the audit log

Contract Change Request - Erosion Control 3 - Project No. 40.00067 - Windows Internet Explorer

From: [Elisa Garcia](#) Task Due Date: 04/13/2012 Task Notes (0)

To: [CMS Fiscal - Change Orders/Elisa Garcia](#) Task Status: [Not Started](#)

Cc: [Garcia](#)

Sent For: Fiscal Review

BP Progress - Windows Internet Explorer

Workflow Progress

Title: **Erosion Control 3** Current Step: [Fiscal Review](#)

Record No: CCR-00035 BP Setup used: Contract Change Request - Horizontal Projects

Due Date: 04/13/2012 04:08 PM Local (GMT-6)

Step Name	Completion Rule	Status
Creation	Any User	Completed
Fiscal Review	Any User	Not Started
PM Team	Any User	Not Started
Contracts Review	Any User	Not Started
Contractor Review	Any User	Not Started
Consultant Review	Any User	Not Started
SAWS Construction Group	Any User	Not Started
SAWS Contract	All Users	Not Started

Tasks for the selected step:

Assignee	Company	Status	Action	Due Date	Completion Date
Elisa Garcia	CoSA	Not Started		04/13/2012 04:08 PM	
Mary Gonzalez	CoSA	Not Started		04/13/2012 04:08 PM	
James Reeves	CoSA	Not Started		04/13/2012 04:08 PM	
Evelyn McRae	CoSA	Not Started		04/13/2012 04:08 PM	
Jessica Shirley-Sae	CoSA	Not Started		04/13/2012 04:08 PM	
Fernando Hermende	CoSA	Not Started		04/13/2012 04:08 PM	
Samuel Hutchins	CoSA	Not Started		04/13/2012 04:08 PM	

View Graphic... Close

Creating a Request for Information (RFI)

1. Click Collaboration
2. Tasks
3. New
4. Select RFI

1. Complete the Upper form
2. Select Workflow Action on the Upper right
3. Add Attachments, if needed
4. Complete Lower form - Collaboration
5. Go to Middle form – Action detail
6. Select whom to CC
7. Click Add
8. Click OK
9. Click Send

Notification of RFI sent

The screenshot shows a web browser window with the title "Create New RFIs - Project No. 40-00062 - Windows Internet Explorer". The address bar shows a URL from "us15.sforce.com". The browser's menu bar includes File, Edit, View, Actions, and Help. Below the menu bar is a toolbar with buttons for Send, Save, Spelling, Undo, Accept Task, Add Attachment, and Close Window. The main content area is titled "RFIs" and contains a form with the following sections:

- Shell Information:** Includes fields for Project ID (40-00062), Project Name (Rip Rap #69 Phase II C Part 4 (Comm)), Title, Record Number, Due Date, Disciplines (with a "Select..." button), Reference ID, Creator (Elisa Garcia), Creation Date, Status, and Priority Level (a dropdown menu).
- Action Requested:** Includes fields for RFI Question and Proposed Solution.
- Cost and Schedule Information:** Includes dropdown menus for Cost Impact, Schedule Impact, and Impact Day Type, as well as text boxes for Estimated Cost, Est. Schedule Impact (days), Cost Impact Notes, and Schedule Impact Notes.

At the bottom of the form, there are tabs for "Action Details" and "Collaboration". Below the tabs are links for "Linked Records (0)" and "Linked Mail (0)". The browser's status bar at the bottom shows "Internet" and a 100% zoom level.

RFI Response

You will receive an email that an RFI requires your review and it will contain a link

1. Click on the link and it will open up the RFI
2. Click on Accept Task
3. Open the Upper Form (RFI)
4. Select collaboration to provide your comments
5. Scroll to the bottom and Type in your Approved Response
 - Only if you are the consultant or PM team and you are providing the final response.
6. Select a Workflow Action
7. Click on Send

Creating a Submittal

1. Click Collaboration
2. Tasks
3. New
4. Select Submittals

1. Complete the Upper form
2. Select Workflow Action on the Upper right
3. Complete Lower form – Line Item List
4. Go to Middle form – Action detail
5. Select whom to CC
6. Click Add
7. Click OK
8. Click Send

Notification of Submittal sent

The screenshot shows a web browser window titled 'Create New Submittals - Project No. 40-00062 - Windows Internet Explorer'. The address bar shows a URL from 'skire.com'. The browser has a menu bar (File, Edit, View, Actions, Help) and a toolbar with buttons for Send, Save, Spelling, Discussion, and Close Window. The main content area is titled 'Submittals' and contains a 'General' tab. The 'Shell Information' section includes fields for Project ID (40-00062), Project Name (Rip Rap #69 Phase II C Part 4 (Commercial to...)), Title, Record Number, Due Date, Reference ID, Creator (Elisa Garcia), Status, Creation Date, Drawing No., and Specification Section. Below this is a large text area for Description. At the bottom, there are tabs for 'Action Details', 'Line Item List', 'Linked Records (0)', 'General Comments', and 'Linked Mail (0)'. The status bar at the very bottom shows 'Done' and 'Internet'.

Submittal Response

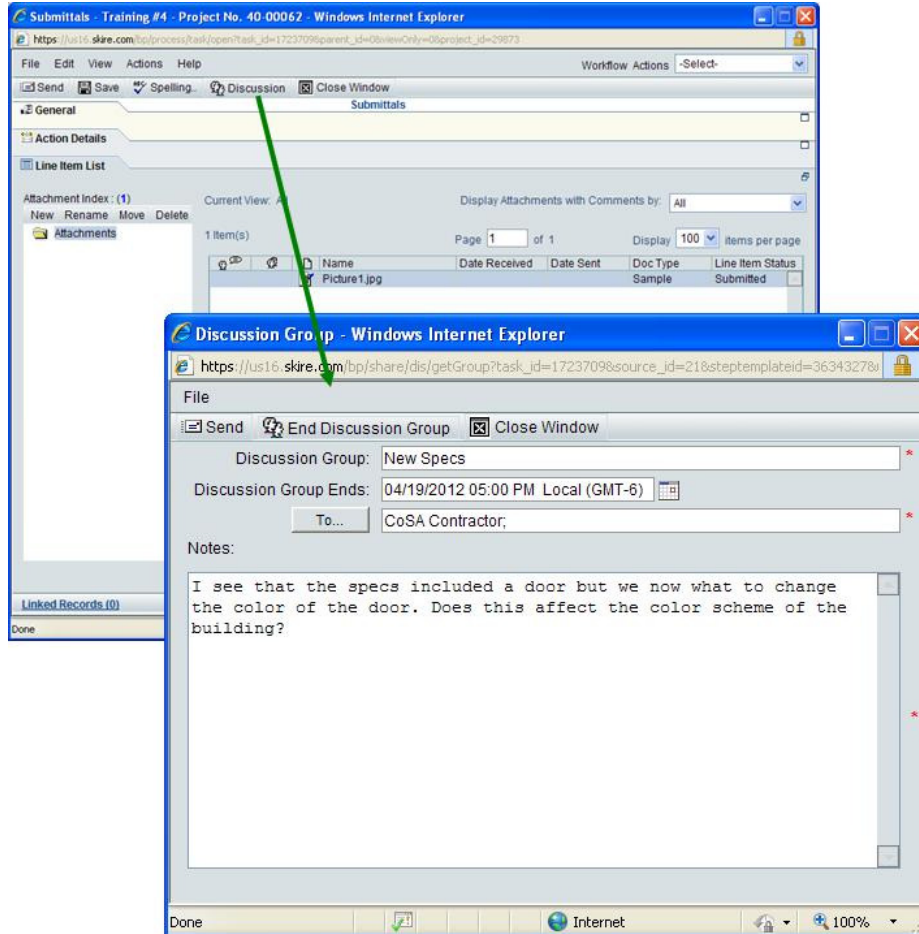
You will receive an email that a submittal requires your review and it will contain a link

1. Click on the link and it will open up the submittal
2. Click on Accept Task
3. Open the Upper Form and review information
4. Open the lower form (Line Item List)
5. Open the Attachment
6. Under the field: Line Item Status you are able to provide status
7. Select a Workflow Action
8. Click on Send

Create a Discussion

Discussion can be used to ask a question on an item or to get further clarification.

Click on Discussion



Meeting Minutes

1. Click Collaboration
2. Tasks
3. New
4. Select Meeting Minutes
5. Complete fields as desired
6. Select a Workflow Action
7. Select Action Line Items
 - Click on Add
 - Complete fields as desired
8. Click Ok
9. Click Send

Permits

1. Click Collaboration
2. Tasks
3. New
4. Select Permits
5. Complete fields as desired
6. Click on Finish Editing

Cost Sheets

1. Select Cost manager
2. Select Cost Sheet
3. Double Click on the Cost Sheet listed on right side
4. Everything is listed by WBS #
 - Under the File menu you are able to export a Summary Cost Sheet, Summary Budget, WBS Details and Column Details

Project Information

1. Select Information
2. Select General
3. Double Click on the Project Information on right side
4. Complete fields as desired under Project Information
5. Under the Standard form you are able to enter major points of the project or key issues